



3riversfcu.org | 260.399.8236

BUSINESS LOAN CHECKLIST

Aggregate Loan Requests
under \$50,000

■ Please use this checklist as you prepare the necessary information for your appointment:

- A completed and signed 3Rivers Federal Credit Union Business Services loan application
- Copies of most recently filed personal and/or business tax returns
- A copy of purchase agreement, if applicable

■ If not checked above, please provide the applicable documents:

- Articles, Partnership Agreement, or Assumed Business Name Certificate
- Certificate of Incorporation or Organization
- Operating agreement or bylaws for the organization
- IRS tax I.D. number notification

■ If in business for less than 1 year and/or no tax filings to date:

- Year-to-date Balance Sheet and Profit & Loss Statement - Inception through current

Additional information may be required for a final credit decision. Anything less than the above described data may slow the approval and closing process. Should you have any questions, or need clarification, on any of the above information please contact:

Name _____

Office _____

Phone _____

Fax _____